

ABSTRACT

A method in a financial advice system for providing specific recommendations regarding the purchase and sale of specific assets for a client's portfolio. The method can operate to provide specific reasons for each recommended action, and can provide alternative
5 actions for different purchases and sales. Further, the method allows for accounting for specific client preferences and characteristics. The method also provides a sequential approach of inputting client preferences and characteristics and generating a recommended asset allocation taking into account the client's preferences and characteristics. Further, the method can allow for a user to make specific preference indications regarding the purchase
10 and sale of specific assets.